

# Evaluation Summary Report (BIE)

Last Modified on 12/14/2025 8:45 pm CST

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Tool Search: Special Ed Documents

Evaluations are used to document the student's educational needs and determine eligibility for special education. This document describes each editor, the section(s) of the print format that includes the entered information, a description of each field on the editor, and any special considerations and instructions for using the editor and fields.

**An evaluation must be created whether or not the student is determined to have a disability.** The school district gives a copy of the evaluation summary report, including the documentation of eligibility, to the student's parents. For information on general functionality, navigation, and additional plan and evaluation features, see the core [Plan and Evaluation Information](#) article.

The current format of this document is the **BIE Evaluation 2023**. Evaluation formats are selected in the [Eval Types](#) tool.

Editor Home - BIE Evaluation Summary Report <a href="#">?</a>			
NAME	STATUS	MODIFIED BY	COMPLETED BY
Evaluation Header	<a href="#">IN PROGRESS</a>	System Administrator 7/17/23 9:35 AM	<a href="#">&gt;</a>
Enrollment Information	<a href="#">IN PROGRESS</a>	System Administrator 7/17/23 12:27 PM	<a href="#">&gt;</a>
Student Information	<a href="#">IN PROGRESS</a>	System Administrator 7/17/23 9:35 AM	<a href="#">&gt;</a>
Parent/Guardian Information	<a href="#">IN PROGRESS</a>	System Administrator 7/17/23 12:33 PM	<a href="#">&gt;</a>
Reasons for Referral	<a href="#">NOT STARTED</a>		<a href="#">&gt;</a>
Intellectual Skills	<a href="#">NOT STARTED</a>		<a href="#">&gt;</a>
Academic Achievement	<a href="#">NOT STARTED</a>		<a href="#">&gt;</a>

[Editor Home](#)

## Evaluation Header

The Evaluation Header editor lists general information about the Evaluation.

**Evaluation Header** IN PROGRESS

Editor 1 of 19

**Evaluation Due Date**  
 03/13/2023

**Evaluation Type**

Initial

**Consent Date \***

01/09/2023

**Date Consent Received by School \***

01/12/2023

**Date Evaluation Completed \***

01/18/2023

**Reason 60 day timeline not met**
*Evaluation Header Editor*
▶ [Click here to expand...](#)

Field	Description	Validation
<b>Evaluation Due Date</b>	A day 60 days from the date consent to evaluate the student for special education services is received.	This field auto-populates to a date 60 days from the date entered in the Date Consent Received by School field. This field is read-only.
<b>Date Evaluation Completed</b> <i>Required</i>	The day the evaluation is completed.	N/A
<b>Evaluation Type</b>	The type of evaluation. Options include: <ul style="list-style-type: none"> <li>• Initial</li> <li>• Reevaluation</li> </ul>	N/A
<b>Consent Date</b> <i>Required</i>	The day the consent is sent to the student's parent/guardian.	N/A
<b>Date Consent Received by School</b> <i>Required</i>	The day the school received consent from the student's parent/guardian to evaluate the student for special education services.	The date entered in this field automatically calculates to a date 60 days in the future. When a date is entered here, the Evaluation Due Date auto-populates.
<b>Date Evaluation Completed</b> <i>Required</i>	The day the evaluation was completed for the student.	N/A

Field	Description	Validation
<b>Reason 60 day timeline not met</b>	<p>The explanation for why the evaluation was not completed within the 60 day timeline. Options include:</p> <ul style="list-style-type: none"> <li>• Parent repeatedly fails or refuses to make child available for evaluation</li> <li>• Child transfers to new school after previous school has begun and evaluation is not completed (child no longer under the jurisdiction of the school)</li> <li>• Contract not awarded</li> <li>• Inclement weather</li> <li>• Evaluator not available</li> <li>• Other</li> </ul>	This field does not print.

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## Enrollment Information

The Enrollment Information editor reports Special Education information from the student's Enrollment.

The **Refresh** button retrieves a fresh copy of data from the student's record.

Enrollment Information IN PROGRESS

Editor 2 of 19

Click Refresh to retrieve a new copy of data from a selected Enrollment record.

School	High School	Grade	11
<b>District Information</b>			
District Number	District Name		
	Public School		
District Address	District Phone		
MT 59540			
District SPED Address	District SPED Phone		
MT 59540			

*Enrollment Information Editor*

► [Click here to expand...](#)

Field	Description	Location (when Refresh is clicked)
<b>School</b>	The name of the school associated with the student's Enrollment record.	Student Information > General > Enrollments > School
<b>Grade</b>	The student's current grade.	Student Information > General > Enrollments > Grade  Enrollment.grade
<b>District Information</b>		
<b>District Number</b>	The district number associated with the Enrolled school.	System Administration > Resources > District Information > State District Number
<b>District Name</b>	The district name associated with the Enrolled school.	System Administration > Resources > District Information > Name
<b>District Address</b>	The district address associated with the Enrolled school.	System Administration > Resources > District Information > Address
<b>District Phone</b>	The district phone number associated with the Enrolled school.	System Administration > Resources > District Information > Phone
<b>District SPED Address</b>	The district special education address associated with the Enrolled school.	System Administration > Resources > District Information > SPED Address
<b>District SPED Phone</b>	The district special education phone number associated with the Enrolled school.	System Administration > Resources > District Information > SPED Phone

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## Student Information

The Student Information editor displays basic information about the student such as demographic information. This is a read-only editor.

The **Refresh** button retrieves a fresh copy of data from the student's record.

**Student Information** IN PROGRESS

Editor 3 of 19

When an Evaluation is generated, a snapshot of the student's information is taken from Census. Click Refresh to retrieve a new copy of data.

Last Name	First Name	Middle Name	Suffix
	Carter	Joe	
Race/Ethnicity	Birthdate	Age	
05: White, Non-Hispanic			
Address			
	MT 59540		
Primary Language	NASIS ID		
Case Manager Information			
Name	Title		
Phone			

*Student Information Editor*

▶ [Click here to expand...](#)

Field	Description	Location (when Refresh is clicked)
<b>Last Name</b>	The student's last name.	Census > People > Demographics > Last Name  identity.lastName
<b>First Name</b>	The student's first name.	Census > People > Demographics > First Name  identity.firstName
<b>Middle Name</b>	The student's middle name.	Census > People > Demographics > Middle Name  identity.middleName
<b>Suffix</b>	The student's suffix.	Census > People > Demographics > Suffix Name  identity.suffix
<b>Race/Ethnicity</b>	The student's state defined race.	Census > People > Demographics > State Race/Ethnicity
<b>Birthdate</b>	The student's birthdate.	Census > People > Demographics > Birth Date  identity.birthDate
<b>Age</b>	The student's age.	Census > Person Information > Age

Field	Description	Location (when Refresh is clicked)
<b>Address</b>	<p>The student's address.</p> <p>This field becomes a dropdown when more than one address exists for the student. The primary household displays by default.</p>	<p>Census &gt; Households &gt; Address Info</p> <p>address.number; address.street; address.tag; address.prefix; address.dir; address.apt; address.city; address.state; address.zip</p>
<b>Primary Language</b>	The student's first language.	<p>Census &gt; People &gt; Demographics &gt; Home Primary Language</p> <p>identity.homePrimaryLanguage</p>
<b>NASIS ID</b>	The student's state ID number.	Census > People > Demographics > NASIS ID
<b>Case Manager Information</b>		
<b>Name</b>	The first and last name of the team member.	Student Information > Special Ed > General > Team Members
<b>Title</b>	The role of the team member.	Student Information > Special Ed > General > Team Members
<b>Phone</b>	The phone number of the team member.	Student Information > Special Ed > General > Team Members

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## Parent/Guardian Information

The Parent/Guardian Information editor populates based on the guardian checkbox on the student's [Relationships](#) tool. The editor includes [Demographics](#) information for the student's guardian.

The **Delete** button next to each parent/guardian can be used to remove a parent/guardian from the IEP.

The **Refresh** button retrieves a new copy of parent/guardians' data. This also returns any accidentally deleted people. Manually entered fields do not change when the refresh button is clicked. The user must **Save** after clicking Refresh to capture changes.

**Parent/Guardian Information** IN PROGRESS

Editor 4 of 19

When an Evaluation is generated, a snapshot of the parent/guardian information is taken from Census. Individuals with the Guardian checkbox marked on the Relationship tool for the student display below. Click Refresh to retrieve a new copy of data.

**Brian - Parent**
**Print Sequence**

1

Delete

**Address**

MT 59540

**Home Phone**

[REDACTED]

**Work Phone**

[REDACTED]

**Cell Phone**
**E-mail**
**Elizabeth - Parent**
**Print Sequence**

2

Delete

**Parent/Guardian Information Editor**

▶ [Click here to expand...](#)

Field	Description	Validation
<b>Last Name</b>	The last name of the parent/guardian.	This field populates from Census. This is part of the header for the parent/guardian.
<b>First Name</b>	The first name of the parent/guardian.	This field populates from Census. This is part of the header for the parent/guardian.
<b>Middle Name</b>	The middle name of the parent/guardian.	This field populates from Census. This is part of the header for the parent/guardian.
<b>Suffix</b>	The suffix of the parent/guardian.	This field populates from Census. This is part of the header for the parent/guardian.
<b>Relationship</b>	The relation of the parent/guardian to the student.	This field populates from Census. This is part of the header for the parent/guardian.
<b>Print Sequence</b>	The print order of the parent/guardian(s) on the IEP.	When no Sequence is selected, parent/guardian(s) print in the order displayed in the UI. When any Sequences are selected, parent/guardian(s) with a sequence number prints in the order defined. Unordered parent/guardians display below the sequenced records.

Field	Description	Validation
<b>Address</b>	The parent/guardians' address.	This field populates from Census > Household > Addresses.  When there are multiple addresses for a person, the drop down with an option to select which address displays. When there is only one address, the drop down only has one option. The populated address is the one marked Primary.
<b>Home Phone</b>	The home phone number of the parent/guardian.	This field populates from Census > Personal Contact Information > Household Phone.
<b>Work Phone</b>	The work phone of the parent/guardian.	This field populates from Census > People > Demographics > Work Phone.
<b>Cell Phone</b>	The cell phone of the parent/guardian.	This field populates from Census > Personal Contact Information > Cell Phone.
<b>Email</b>	The primary email address for the parent/guardian.	This field populates from Census > Personal Contact Information > Email.

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## Reasons for Referral

The Reasons for Referral editor is used to document the reasons the parent/guardian(s) and/or school personnel referred the student for an evaluation.



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## Intellectual Skills

The Intellectual Skills editor is used to document the student's current level of intellectual development.

Intellectual Skills NOT STARTED

Editor 6 of 19

Current Intellectual Assessment Results

Intellectual Information *Intellectual Skills Editor*[^ Back to Top](#)

## Academic Achievement

The Academic Achievement editor is used to document the student's current level of academic achievement in the classroom.

Academic Achievement NOT STARTED

Editor 7 of 19

Current Academic Achievement Assessment Results

Academic Information *Academic Achievement Editor*[^ Back to Top](#)

## Communication Skills

The Communication Skills editor is used to document the student's current level of communication skills.

Communication Skills NOT STARTED

Editor 8 of 19

Current Communication Skills Assessment Results

Communication Information *Communication Skills Editor*[^ Back to Top](#)

# Physical/Medical

The Physical/Medical editor is used to document the student's physical and medical health.

Physical/Medical NOT STARTED

Editor 9 of 19

Current Physical/Medical Assessment Results

Physical/Medical Information □

*Physical/Medical Editor*

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# Motor Skills

The Motor Skills editor is used to document the student's current level of movement and motor ability.

Motor Skills NOT STARTED

Editor 10 of 19

Current Gross and/or Fine Motor Skills Assessment Results

Gross and/or Fine Motor Skills □

*Motor Skills Editor*

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# Social, Emotional and Behavioral

The Social, Emotional and Behavioral Skills editor is used to document the student's current level of emotional and behavioral abilities.

Social, Emotional and Behavioral NOT STARTED

Editor 11 of 19

Current Social, Emotional and Behavioral Assessment Results

Social, Emotional and Behavioral Information □

*Social, Emotional and Behavioral Editor*

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## Adaptive Skills

The Adaptive Skills editor is used to document the student's current level of adaptive skills.



Adaptive Skills NOT STARTED

Editor 12 of 19

Current Adaptive Skills Assessment Results

Adaptive Skills □

Adaptive Skills Editor

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## Hearing

The Hearing editor is used to document the student's hearing abilities.



Hearing NOT STARTED

Editor 13 of 19

Current Hearing Assessment Results

Hearing □

Hearing Editor

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## Vision

The Vision editor is used to document the student's visual abilities.



Vision NOT STARTED

Editor 14 of 19

Current Vision Assessment Results

Vision □

Vision Editor

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## Vocational

The Vocational editor is used to document the student's vocational skills.



Vocational NOT STARTED Editor 15 of 19

Current Vocational Assessment Results

Vocational

Vocational Editor

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## Developmental Delay

The Developmental Delay editor is used to document any delays to the student's development.



Developmental Delay NOT STARTED Editor 16 of 19

Current Developmental Delay Assessment Results

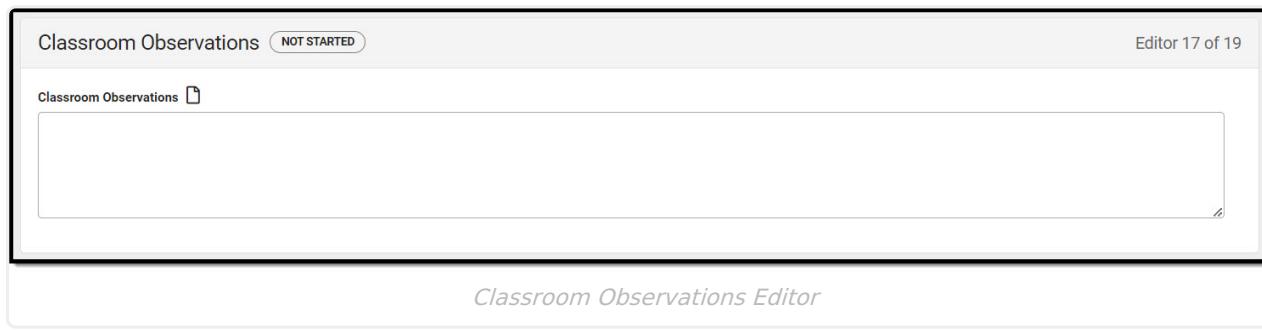
Developmental Delay

Developmental Delay Editor

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## Classroom Observations

The Classroom Observations editor is used to describe the student's performance in the classroom.



Classroom Observations NOT STARTED Editor 17 of 19

Classroom Observations

Classroom Observations Editor

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## Other

The Other editor is used to document any additional information pertinent to the evaluation of the student for a determination of eligibility.

Other NOT STARTED

Editor 18 of 19

Other □

Other Editor

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## Determination of Eligibility

The Determination of Eligibility editor is used to document the team's decision regarding the action needed for the student based on all the data collected in the previous editors.

Determination of Eligibility IN PROGRESS

Editor 19 of 19

The evaluation team has reviewed the evaluation data and proposed the following action:

**Eligibility Determination \***

This child has a disability, as defined in the Individuals with Disabilities Education Act (IDEA 2004), in the area of (Visual Impairments). This disability adversely affects educational performance, and the child requires specialized instruction. The team agrees that neither lack of instruction in reading or math, nor limited English proficiency was a factor in this determination.

This child does not have a disability, as defined in the Individuals with Disabilities Education Act (IDEA 2004), that adversely affects educational performance, and does not require specialized instruction.

**Related Services are required for this child.**

No ▼

If yes, list service(s):

Does this child need further evaluation to determine special education services?

If yes, refer to the child's Assessment Plan.

Determination of Eligibility Editor

► [Click here to expand...](#)

Field	Description	Validation
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Field	Description	Validation
<b>Eligibility Determination</b> <i>Required</i>	<p>The determination of the team. Options include:</p> <ul style="list-style-type: none"> <li>• This child has a disability, as defined in the Individuals with Disabilities Education Act (IDEA 2004), in the area of (select Primary Disability below). This disability adversely affects educational performance, and the child requires specialized instruction. The team agrees that neither lack of instruction in reading or math, nor limited English proficiency was a factor in this determination.</li> <li>• This child does not have a disability, as defined in the Individuals with Disabilities Education Act (IDEA 2004), that adversely affects educational performance, and does not require specialized instruction.</li> </ul>	<p>Only one option can be selected.</p> <p>When a user selects a primary disability, the disability populates to (Select Primary Disability Below).</p>
<b>Related Services are required for this child.</b>	<p>Indicates the student requires related services. Options are Yes or No.</p>	N/A
<b>If yes, list service(s)</b> <i>*Required</i>	<p>A description of the services required.</p>	<p>*This field is available and required when Yes is selected for "Related Services are required for this child."</p>
<b>Does this child need further evaluation to determine special education services?</b> <i>*Required</i>	<p>Options are Yes or No.</p>	<p>*This field is available when No is selected for the Eligibility Determination question.</p>

Field	Description	Validation
<b>Primary Disability</b> <i>*Required</i>	The student's primary disability. Options include: <ul style="list-style-type: none"> <li>• Intellectual Disabilities</li> <li>• Hearing Impairments/Deafness</li> <li>• Speech or Language Impairments</li> <li>• Visual Impairments</li> <li>• Emotional Disturbance</li> <li>• Orthopedic Impairments</li> <li>• Other Health Impairments</li> <li>• Specific Learning Disabilities</li> <li>• Deaf/Blindness</li> <li>• Multiple Disabilities</li> <li>• Autism</li> <li>• Traumatic Brain Injury</li> <li>• Developmental Delay</li> </ul>	*This field is required when users selects the check box for "This child has a disability..." and is unavailable when "This child does not have a disability..." is selected.
<b>Determination of Eligibility Date</b> <i>Required</i>	The day the team made the eligibility determination decision.	This field always displays on print.  <b>Ad hoc inquiries:</b> evaluation.determinationDate

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## Previous Versions

[Evaluation Summary Report \(BIE\) \[.2327 and previous\]](#)